Introduction to the 2015 Texas Public Library Annual Report

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Texas State Library and Archives Commission
Library Development and Networking Division
Tuesday, January 12, 2016, 2:00 PM

What's covered

- Reasons to report
- Rules, deadlines
- Accreditation
- Annual report
- Data collection portal
- Resources

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Why Report?

"**Without data, all you are is just another person with an opinion**." (Author Unknown)

- Participation in National Public Library Data Collection System https://www.imls.gov/research-tools/data-collection
- Accreditation in Texas State Library System
- If you don't report, we have no information about your library!

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Rules

Texas Administrative Code §1.71 - §1.86

Minimum Standards for Accreditation of Public Libraries in the State Library System

http://tinyurl.com/TACaccreditation

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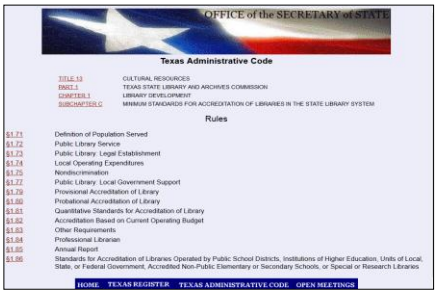
Rules



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§1.71 – Population Assignment

- Assigned by sources of governmental entity funding: city, county, school district
- Multiple libraries in a county that receive city and county revenue have population assigned in proportion to city size, as compared to county
- Not based on geography

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§1.85 - Deadlines

Texas Administrative Code §1.85
Annual Report

"A public library shall file a current and complete annual report with the Texas State Library and Archives Commission ***by April 30****. Revisions to the annual report which would affect membership status for the next fiscal year will not be accepted after* ***July 31****..."*

Target►►►**MARCH 31, 2016**

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Resources

- Annual Report webpage, Texas State Library
  https://www.tsl.texas.gov/landing/statistics.html
- LibPAS – data collection portal:
  https://tx.countingopinions.com/main.php

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Resources

Library Development & Networking (LDN)
800-252-9386 toll free, in Texas

Valicia Greenwood, Library Statistics Specialist
valicia.greenwood@tsl.texas.gov, 512-463-5466

Stacey Malek, Program Coordinator
stacey.malek@tsl.texas.gov, 512-463-5532

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QUESTIONS

Rules,
population assignment,
deadlines

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Accreditation Benefits

- TexShare card
- TexShare databases
- Interlibrary Loan ILL
- E-rate
- Competitive grants

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Accreditation Criteria

- Contact criteria
  - Published phone
  - Website

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Accreditation Criteria

- Financial criteria
  - Expenditure criteria
  - Maintenance of Effort (MOE)
  - Government support

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Maintenance of Effort

§1.74 – Local Operating Expenditures

Question **4.2**: Local Funds used for Library Operating Expenditures

- 3-year average
- Calculated two ways
- Exemption amount

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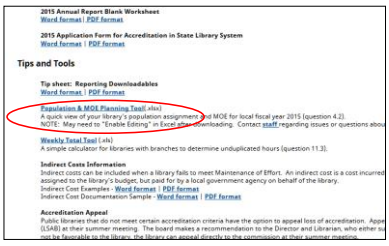
Maintenance of Effort

Look it up!
https://www.tsl.texas.gov/ld/pubs/arsma/index.html


2015 Annual Report Blank Worksheet
Word format | PDF format

2015 Application Form for Accreditation in State Library System
Word format | PDF format

Tips and Tools

Tip sheet: Reporting Downloadables
Word format | PDF format

Population & MOE Planning Tool (.xlsx)
A quick view of your library's population assignment and MOE for local fiscal year 2015 (question 4.2).
NOTE: May need to "Enable Editing" in Excel after downloading. Contact staff regarding issues or questions about

Weekly Total Tool (.xls)
A simple calculator for libraries with branches to determine unduplicated hours (question 11.3).

Indirect Costs Information
Indirect costs can be included when a library fails to meet Maintenance of Effort. An indirect cost is a cost incurred assigned to the library's budget, but paid for by a local government agency on behalf of the library.
Indirect Cost Examples - Word format | PDF format
Indirect Cost Documentation Sample - Word format | PDF format

Accreditation Appeal
Public libraries that do not meet certain accreditation criteria have the option to appeal loss of accreditation. Appe (LSAB) at their summer meeting. The board makes a recommendation to the Director and Librarian, who either su not be favorable to the library, the library can appeal directly to the commission at their summer meeting.

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Accreditation Criteria

RULE §1.81: Per capita minimums, by population category FY15 and FY16

Library population Assignment	FY2015	FY2016
500,001+	$13.82	$13.89
200,001 – 500,000	$11.95	$12.01
100,001 – 200,00	$9.60	$9.79
50,001 – 100,000	$8.00	$8.16
25,001 – 50,000	$5.31	$5.42
10,001 – 25,000	$4.25	$4.34
5,001 – 10,000	$3.97	$4.05
1 – 5,000	$3.70	$3.77

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Accreditation Criteria

- Service criteria
  - Searchable catalog
  - # Items in collection, how current
  - Long-range plan
  - Copier, computer for staff and public
  - Interlibrary loan (ILL)
  - Hours library available to public

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Accreditation Criteria

- Librarian qualification criteria
  - Professional librarians (libraries serving more than 25,000 persons)
  - Number of hours employed
  - Continuing Education requirement

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QUESTIONS

Accreditation

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Texas Public Library Annual Report

- Basic facility information for central library
- Financial information
- Library operation statistics

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Basic Facility Information

Section 1 - Contact information

Section 2 - Number of outlets, square footage

- Branch information will be reported in Section 12

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Financial Information

Section 3 – Expenditures

REPORT ACTUAL EXPENDITURES, NOT BUDGETED AMOUNTS

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Financial Information

Section 3 – Expenditures

3.1-3.11 Library Operating Expenditures

3.1 - 3.3 Staffing Expenditures

3.4 - 3.7 Collection Expenditures

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Financial Information

Section 3 – Expenditures

3.8 Other Operating Expenditures

3.12 Library Capital Expenditures

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New question

3.0 Did the library expend any funds from sources *outside the library's home county* such as Tocker Foundation, Dollar General, Hancher Foundation, Texas Book Festival, NEA, or similar sources?

If **Yes**, include in Section 3, but <u>not</u> in Section 4.

If **No**, include all expenditures from Section 3 in Section 4.

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Financial Information

Section 4 – Local Financial Effort

- **4.1** Local funds used for collection materials

  Exclude grants from outside library's home county

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Financial Information

Section 4 – Local Financial Effort

- **4.2** Local funds used for library operating expenditures - Used for calculating **MOE**
- **4.3** Local government funds used for library operating expenditures - Accreditation criteria

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Financial Information

Section 5 – Revenues

Report revenues when received, whether expended (used) or not .

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Financial Information

Section 5 – Revenues

5.1 – 5.12 Revenues used for library *operation*

5.9 Grants – Local and non-local. **Indicate Source**!

5.10 Other local sources of funding – Friends, donations, fines, fees, etc. No "in kind" amounts

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Financial Information

Section 5 – Revenues

5.13 – 5.21 Revenues used for *capital* expenditures

5.22 – 5.23 Revenue sources *outside* home county

Skip question if all revenue came from local sources.

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Library Operation

Section 6 – Library Collection

- Physical materials: titles vs items
- Downloadable materials: library vs consortium
- Databases
- Totals
- One percent

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Library Operation

Section 7 – Services

- Long-range plan
- Reference transactions
- Library visits
- Users
- Circulation: Physical vs digital
- Programs: Events and Attendance

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Library Operation

Section 8 – Staffing

- Hours worked
- Director/head librarian's salary and Continuing Education

https://www.tsl.texas.gov/ld/librarydevelopment/

- Equipment available to staff

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Library Operation

Section 9 – Resource Sharing

https://www.tsl.texas.gov/landing/ill.html

Accreditation issue – Statewide ILL

Contact: Sara Hayes, ILL Coordinator
sara.hayes@tsl.texas.gov,
512-463-5406

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Library Operation

Section 10 – Internet and Computer Use

Accreditation issue: website

Contact: Henry Stokes, Library Technology Consultant
henry.stokes@tsl.texas.gov 512-463-6624

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Library Operation

Section 11 – Library Hours

Accreditation issue: unduplicated hours

Weekly Total Hours Calculator - COMPOSITE NUMBER OF HOURS

This chart is provided as an aid in calculating the total number of hours of library service provided by your main library and branches. Place a "1" in the space for each hour in which one or more of your library facilities is open. If a library is open only part of a given hour, enter "1/2", "3/4", etc. Add each column to determine the weekly total for a regular week. Report the totals in the spaces below, and then the total Weekly Total Amount in **11.5.**

TIME	SUN	MON	TUES	WED	THUR	FRI	SAT	
7:00 - 8:00 a.m.								
8:00 - 9:00 a.m.								
9:00 - 10:00 a.m.								
10:00 - 11:00 a.m.								
11:00 - 12:00 a.m.								
12:00 - 1:00 p.m.								
1:00 - 2:00 p.m.								
2:00 - 3:00 p.m.								
3:00 - 4:00 p.m.								
4:00 - 5:00 p.m.								
5:00 - 6:00 p.m.								
6:00 - 7:00 p.m.								
7:00 - 8:00 p.m.								
8:00 - 9:00 p.m.								
9:00 - 10:00 p.m.								
DAILY TOTALS	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00 <= WEEKLY TOTAL

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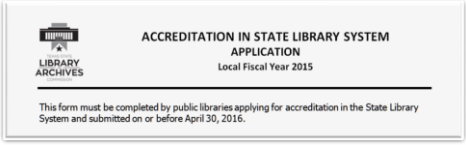
Application for Accreditation

Application form is found on

- Blank worksheet forms
- https://tx.countingopinions.com/main.php
- https://www.tsl.state.tx.us/ld/pubs/arsma/index.html


ACCREDITATION IN STATE LIBRARY SYSTEM
APPLICATION
Local Fiscal Year 2015

This form must be completed by public libraries applying for accreditation in the State Library System and submitted on or before April 30, 2016.

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QUESTIONS

Annual Report

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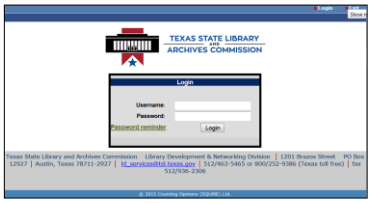
Online Data Collection

LibPAS
https://tx.countingopinions.com/



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Home Page

Welcome Texas Public Library

Click on the Enter button below to complete the online survey form

▼▼▼

Enter

Forms, Tools and Tips for Texas Public Libraries Annual Report

Forms

- Blank Annual Report Worksheet
- Application form for Accreditation in State Library System

Tools

- Population & MOE Planning Tool
- Weekly Total Tool

Tips

- Reporting Downloadables
- How to use the Online Form
- Public Library Annual Report Webpage

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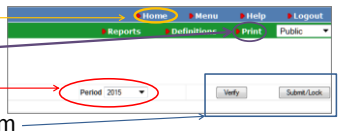
Data Input

Form features

- Home
- Print
- Period
- Submit Form



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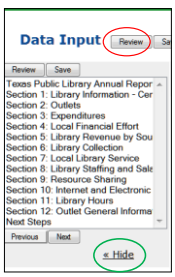
Data Input

- Navigation



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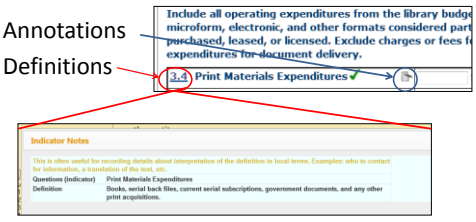
Data Input

- Annotations
- Definitions



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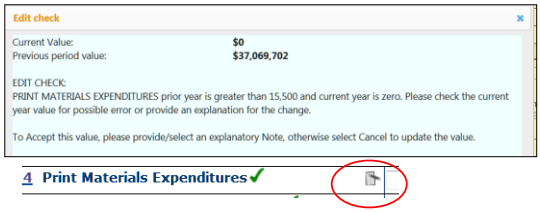
Data Input

Use annotations/notes/explanations!



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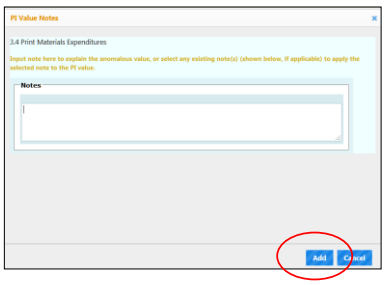
Data Input



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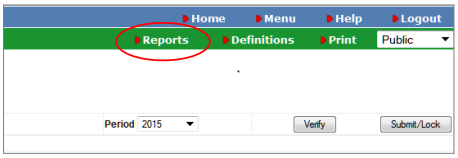
Reports



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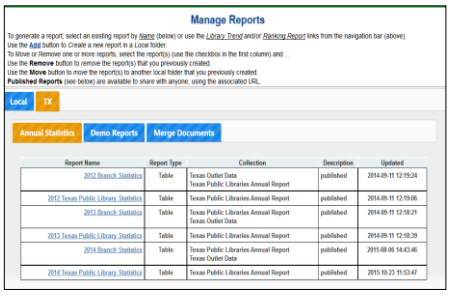
Reports



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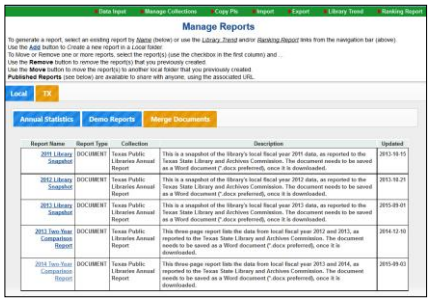
Reports



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QUESTIONS

Data collection portal

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Contact Us!

Library Development & Networking

ld_services@tsl.texas.gov, 800-252-9386

Valicia Greenwood, Library Statistics Specialist
valicia.greenwood@tsl.texas.gov, 512-463-5466

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